

**California Portal Steering Committee**  
**Information Organization, Usability, Currency, & Accessibility (IOUCA)**  
**Working Group Meeting Minutes**

**Date:** January 31, 2006  
**Time:** 9:00 – 11:00 a.m.  
**Location:** LCII, Room 340

**Attendees:**

<input checked="" type="checkbox"/> Neal Albritton (DOR)	<input type="checkbox"/> Steve Branson (DHS)	<input type="checkbox"/> Steve Clemons (CEAP)
<input checked="" type="checkbox"/> Donna Freeman (FTB)	<input type="checkbox"/> Daniel Gullahorn (SCIO)	<input type="checkbox"/> John Jewell (CSL)
<input type="checkbox"/> Lynelle Jolley (DPA)	<input checked="" type="checkbox"/> Patrick Johnson	<input type="checkbox"/> Anamarie Malone (DTS)
<input checked="" type="checkbox"/> Claudina Nevis (SCIO)	<input checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input checked="" type="checkbox"/> Rob Quigley (SCIO)
<input checked="" type="checkbox"/> Deborah Schwartz (CRB)	<input checked="" type="checkbox"/> Theresa Giles (DHS)	

**Discussion:**

**Usability Testing – Contract with Human Factors International** **Donna Freeman**

Franchise Tax Board (FTB) contracted with Human Factors International (HFI) to perform expert analysis of their website and usability testing with their users. They were very pleased with the vendor's performance. FTB also hosts the California Taxes Information Center ([www.taxes.ca.gov](http://www.taxes.ca.gov)), working with Board of Equalization (BOE) and Employment Development Department (EDD). They are considering contracting with HFI for the [www.taxes.ca.gov](http://www.taxes.ca.gov) site. FTB is anticipating spending \$75,000 - \$100,000 for usability testing of the taxes service center; they are spreading the cost between FTB, BOE, and EDD. They felt that, if funding could be made available, it would make sense add testing of the other service centers in development to that contract.

The working group has no funds. Funding must come from the individual projects. The working group could recommend that departments engage HFI for usability testing through extension of the FTB contract or by amending the Statement of Work.

The Department of Rehabilitation (DOR) is writing a Request for Offer (RFO) to hire a vendor to assess California's website for Section 508 accessibility. The RFO is open and could incorporate usability studies. Usability studies and accessibility testing could be conducted in tandem. The templates recommended by the working group must be both usable and accessible (Section 508 at a minimum). If both usability and W3C accessibility could be built into the templates, the issue of usability and accessibility testing could be limited to new designs and pages that do not use one of the approved templates.

**ACTION:** *FTB and DOR will meet to discuss the feasibility of including usability testing in DOR's accessibility study.*

**Assigned To:** *Donna Freeman and Neal Albritton*

**Due:** *February 14, 2006*

**ACTION:** *Develop and propose a policy recommendation regarding the level of accessibility templates for new design must meet and what level they should strive for. Under the current state standards, the goal is to meet Section 508 and/or W3C guidelines for accessibility. If a web developer is not able to meet those guidelines, they must explain why and submit for approval.*

**Assigned To:** *Rob Quigley*

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*Due: February 14, 2006*

**Draft Templates by FTB and DTS**

**Kris Ogilvie**

FTB developed their templates in Dreamweaver; they will use Interwoven's Teamsite Content Management System to push the content out and to perform version control. They are currently working with a user group to develop a template that will allow non-technical users to drop content into Teamsite and format it on the screen, and then push it out into the Dreamweaver template. The problem with this approach is that the software will generate non-standard code and the resulting page will probably not be accessible. Furthermore, users may format the page in a non-accessible manner such as embedding content in tables. Most of their content is currently forwarded to a technical group for input into the website. Some users are entering content directly into Teamsite, but must follow guidelines to ensure the resulting page is accessible.

The FTB template will be made available for working group members to review through their test site. There are three levels of templates and template images. Information is available on that site regarding how FTB developed the design and what usability was implemented in the design. Donna will send the link and password for the test site. She also received approval from her technical counterpart for the working group to host a space on this secure, public-facing site for posting documents and information. The working group would send the content to FTB for posting on the site.

DHS is developing their templates in FrontPage Visual Studio.Net; they will integrate the templates with Content Management Server. The DHS template was designed for 1024 X 768 screen resolution; this does not meet state standards requiring 800 X 600 resolution. However, the Governor's Office is redesigning their site for 1024 X 768 resolution because the number of people still using the lower screen resolution is less than 15-20% and dropping monthly. Per DOR, the problem with designing for the higher resolution is that people still using the lower resolution may not see critical information at the top or on the right of the screen.

DHS contracted with a vendor to develop a design; the result is graphic-heavy, but DHS plans to use this as a placeholder for emergency information. DHS is constructing the actual template in the background; they presented the graphic version only. The anticipated completion date for the templates is tentatively set for March 2006. They are currently working on positioning, cascading style sheets, and are working with DOR to ensure accessibility. They are considering skip navigation for blind users and working with blind and low-vision DHS employees to identify accessibility issues. They want to develop a second set of templates that focuses on content, stripping out the graphics. A printer-friendly version would resolve the accessibility issues with their current graphics and navigation, but this should be a last resort per DOR.

The DHS template is very different from the FTB template. A lot of time and money was spent developing both. There is some concern that allowing departments to develop designs of their own without oversight will waste state money. The State CIO was not made aware of the efforts until after they were underway and funds were committed. The working group should recommend a process for departments who wish to design a new template to ensure that the State is aware of the effort and that some basic standards and guidelines are met. There is a current process that requires departments to submit justification outlining their business need for a

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different look and feel from the rest of the portal for approval. The State Library drafted a proposed procedure for developing new templates. The working group will review these procedures at the next meeting and develop a procedure recommendation to present to the Steering Committee for approval.

**ACTION:** *Provide copies to the working group of the proposed procedure for developing new templates for the state website.*

**Assigned To:** *Deborah Schwartz*

**Due:** *February 7, 2006*

**ACTION:** *Provide copies to the working group of the current process for requesting approval to deviate from the standard look and feel of the state portal.*

**Assigned To:** *Rob Quigley*

**Due:** *February 7, 2006*

**Draft Charter**

**Debbie Schwartz**

The team reviewed and discussed the objective, scope, and deliverables of the working group. The resulting charter elements (attached) will be used to develop a draft charter for review at the next meeting and will be presented to the California Portal Review Board at their February 10<sup>th</sup> meeting.

**ACTION:** *Using the charter elements identified, develop a draft charter for the working group to review.*

**Assigned To:** *Deborah Schwartz*

**Due:** *February 7, 2006*

**Open Forum – Recommendations From Team**

**All**

Due to lack of time, there was no open forum.

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting:

February 7, 2006

OPR (1400 Tenth Street), Room 202

9:00 – 11:00 a.m.

*For Your Information: California Portal Review Board meeting scheduled February 10, 2006*

## **Information Organization, Usability, Currency & Accessibility (IOU)**

### **Working Group**

#### California Portal Steering Committee

**Objective:** To identify and develop recommended standards, guidelines, policies, procedures, and best practices to assist California departments and agencies in developing and maintaining web content and services that is understandable, accessible, and usable by California's diverse citizenry and businesses. To identify and recommend templates that represent best practices in usability and accessibility for departments and agencies to use in developing their web content.

#### **In Scope:**

- Accessibility
  - Section 508
  - W3C
  - All Users
- Usability
  - Look and Feel
    - Page Layout
  - Navigation
  - Content
    - Currency
    - Plain Language
  - Branding
- Findability
  - Metadata
  - Organization
    - Taxonomy
    - Labeling
    - Thesauri

#### **Not In Scope:**

- Search
  - Relevancy
  - Algorithms
  - Spidering
- Marketing
- Enterprise Architecture
- Archiving

#### **Deliverables**

- Recommendations to Portal Steering Committee Regarding
  - Best Practices
  - Guidelines
  - Standards
  - Policies
  - Procedures
  - Templates (Note: Working Group will facilitate the development of templates and make recommendations about the templates. The Working Group will *NOT* be responsible for developing the templates.)